



## **Coaching Guide**

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# **Legal Advice Web Based Training**

April 2004



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## Purpose of this Coaching Guide

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This guide is intended to help structure and support your staff training experience.

By following the proposed action plan, you will be able to:

- Prepare your staff for the Legal Advice Web Based Training.
- Debrief the course with them after they have completed it.
- Create an action plan.
- Support improved on-the-job performance.

Read through the materials in this guide, and then follow the instructions in the last section, “Coach’s Action Items.” By using the ideas and tips in this guide, you will help those you coach retain the concepts and information learned in the course and their ability to apply what they have learned to their jobs.

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## Course Overview

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Providing exceptional customer service to the public who desire access to the courts is a primary function of all court support staff. Often times support staff find themselves in discussions that border on giving legal advice to the public. Since court support personnel are not licensed, practicing attorneys, there are limits to what they are permitted to disclose. These limitations can often create situations where a customer of the court may feel like he/she is not receiving exceptional customer service. This course will help our court support personnel distinguish between legal advice and good customer service.

The Legal Advice Web Based Training is designed to provide court support personnel the skills and confidence necessary to conduct helpful conversations with customers who desire access to the courts, yet without providing legal advice.

Strategies will be developed through specific court related scenarios such as:

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- Concerns customers have regarding the Probate Court
  - Common questions related to Personal Protection Orders
  - General questions District Court clerks would encounter

## **Course Objectives**

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By the end of this course a participant will be able to:

- Clarify the role of the court
- Better understand the types of information court support personnel can provide
- Provide guidelines for determining what is and what is not ‘Legal Advice’

## **Prerequisites**

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Court support personnel should complete the CD-ROM Training “Accessing Michigan Courts”.

## **Pre-work**

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Participants should observe an experienced court employee working with the public on the job for approximately 2 weeks prior to taking this course.

## **Post-work**

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As a coach, you should discuss the development of an action plan during your follow up coaching session.

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## **Tools Learners Will Receive**

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As part the Legal Advice Web Based Training, learners can print a Legal Advice training guide. They can also print a Court Employee Quick Reference to help them determine what they can and cannot say.

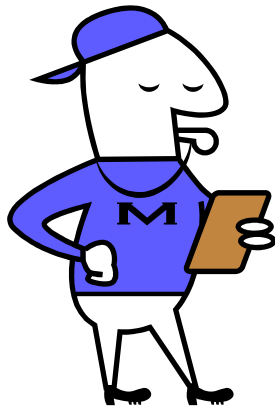
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## Coach's Action Items Checklist

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### Before Training:

- ☐ Schedule a meeting with the participant to discuss the objectives of this course.
- ☐ Ask the participant to bring his/her pre-work (if applicable)
- ☐ Prepare the participant for the course by asking:
  - How do the objectives relate to your job performance?
  - What objective(s) will have the most impact on your performance? Why?
  - What goals do you have for this course?
- ☐ Encourage full participation by ensuring the participant's job duties are covered during training.



### After Training:

- ☐ Schedule a meeting with the employee to discuss the training.
- ☐ Ask the participant to bring any materials printed and/or notes taken.
- ☐ Review the course by asking any or all of the following:
  - Were your expectations for this course met?
  - What did you learn?
  - How do you plan to apply what you have learned?
  - What can I do to help you be successful?
  - How will the course concepts and tools help you meet your performance goals?
- ☐ Agree on action items for your staff member
- ☐ Set expectations for continued coaching interactions and agree on the day and time you will meet again to discuss progress during your next coaching session.

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